Benefits Realisation Management

Many projects finish on time and on budget, yet change nothing for the organisation. Benefits realisation management makes sure that the benefits a project promised are actually delivered. A project produces outputs, such as a new system, and people use them to create outcomes, such as faster service. A benefit is the measurable advantage of an outcome, such as lower cost. Guidance from PMI and APM treats benefits as the reason for a project, and a simple route has four steps: define, plan, track and prove.

1. Define the Benefit

The first step is to define each benefit clearly. A good definition says who gains, what will change and how it will be measured. It also records a baseline, which is today's figure, and a target, which is the figure we want. Without a baseline, nobody can prove that anything improved.

Example: A family fits solar panels. Applying Define the Benefit, they write today's electricity bill as the baseline and a lower figure as the target. A year later, the new bills show exactly what they saved.

At work: Omar manages a new customer portal project. Applying Define the Benefit, he writes the benefit: cut the average answer time from two days to one, with a baseline of two days measured last month. Everyone now knows what success means.

2. Plan and Assign

The second step is to plan how each benefit will be delivered and to give it an owner. A benefit owner is a named person who is accountable for achieving the benefit, often from the business area that gains. Many organisations record benefits in a benefits register, a living table of each benefit with its measure, owner and dates. Planning also asks what changes people must make for the benefit to appear.

Example: A school adds a reading corner. Applying Plan and Assign, the head teacher names one teacher as the owner and lists how reading will be counted. Each term, that teacher reports the figures.

At work: Omar adds the answer-time benefit to the benefits register. Applying Plan and Assign, he names the head of customer service as the owner, because her team's habits must change. The first review date is set.

This document is a property of Asaseeyat Academy - © Copy Right Protected.

3. Track Progress

The third step is to track progress, both while the project runs and after it ends. We review benefits regularly, compare the latest figures with the baseline and the target, and ask whether the plan still makes sense. Benefits often appear only after the new product is in use, so tracking cannot end when the project team leaves. Early warning signs let us act while there is still time.

Example: A runner trains for a race. Applying Track Progress, she times a test run every month and compares it with her target. When progress stalls, she adds a second weekly session.

At work: Omar holds a monthly benefits review after launch. Applying Track Progress, he compares the new figure, one and a half days, with the target of one day. The owner finds that some staff still use the old email route, so training is added.

4. Prove and Sustain

The fourth step is to prove the benefit and to keep it. After an agreed period, we measure again, compare the result with the baseline and report honestly to the sponsor, whether or not the target was met. We also check that the benefit lasts, because people can slip back into old habits. Lessons from the results make the next project's estimates better.

Example: A neighbourhood runs a recycling campaign. Applying Prove and Sustain, volunteers weigh the waste again after six months, compare it with the starting weight and keep weekly reminders.

At work: Six months after launch, Omar's review shows an average answer time of one day. Applying Prove and Sustain, he reports this to the sponsor, and the owner keeps monthly checks because two teams still use old forms.

Conclusion

In summary, benefits realisation management makes sure that a project delivers what it promised, not only what it built. Outputs lead to outcomes, and outcomes create benefits. We define each benefit with a baseline and a target, plan it with a named owner, track it during and after the project, and prove and sustain it with honest reporting. When we manage benefits this way, projects are more likely to create real value.

Sources

- APM Body of Knowledge: Benefits management (Association for Project Management) – https://apm.org.uk/body-of-knowledge/delivery/scope-management/benefits-management
- Project Management Institute, Benefits Realization Management: A Practice Guide – https://www.pmi.org/shop/p-/book/benefits-realization-management-a-practice-guide/00101612401
- UK Government, Guide for Effective Benefits Management in Major Projects – https://www.gov.uk/government/publications/guide-for-effective-benefits-management-in-major-projects

- PMI is a registered mark of the Project Management Institute, Inc.

This document is a property of Asaseeyat Academy - © Copy Right Protected.